

Baltic Media Advertising Market 2010

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Advertising Expenditure 2010

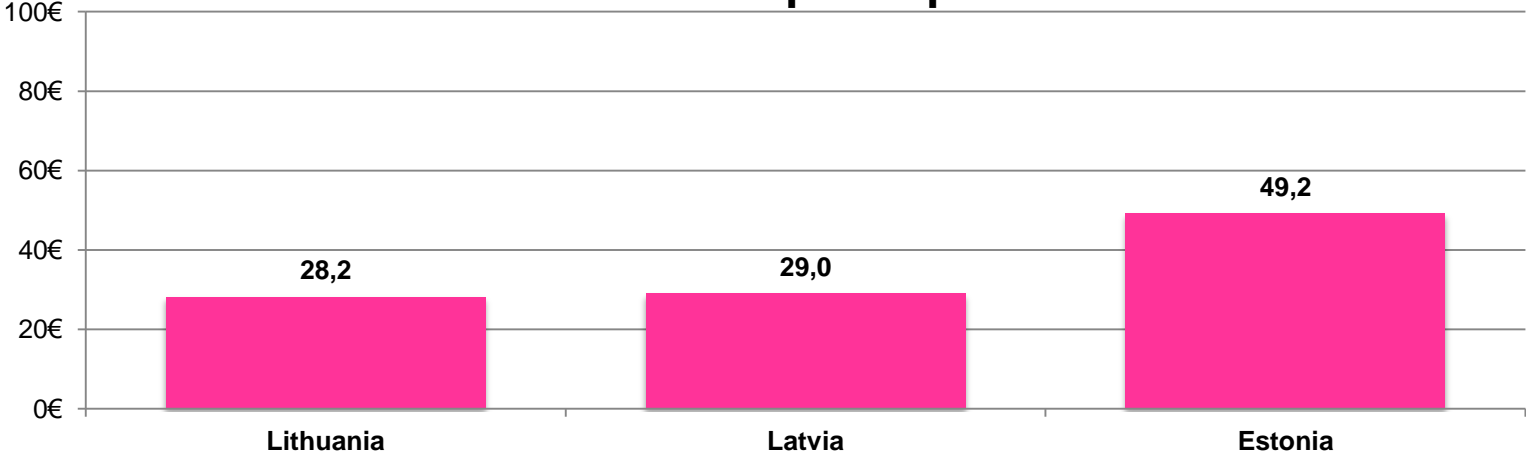
Baltic summary

- Baltic Total 225,3 million EUR
- Change in 2010 -7%

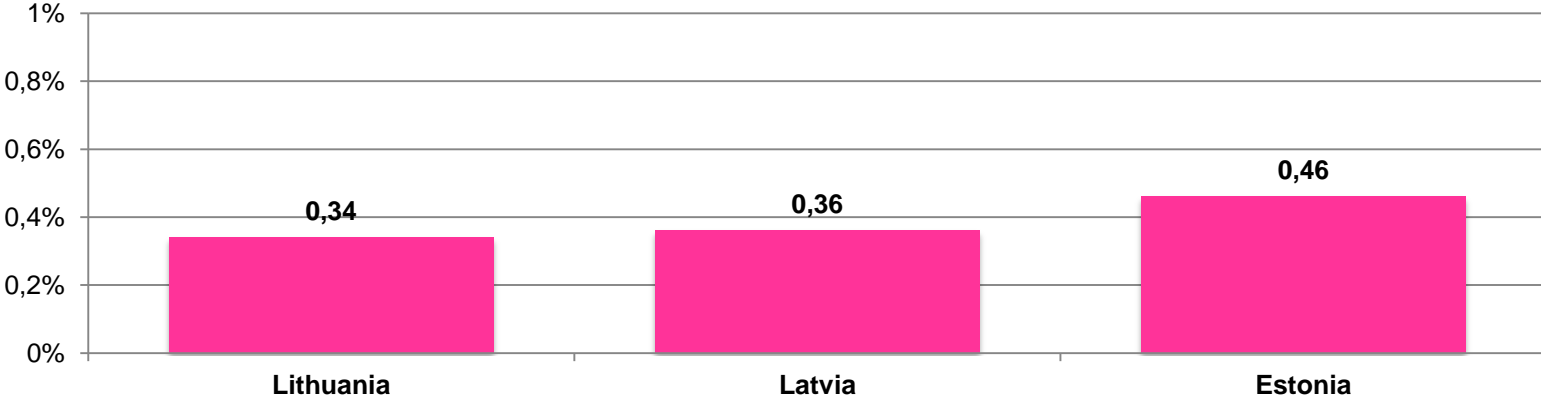
	Lithuania	Latvia	Estonia
TOTAL (million EUR)	94,0 million EUR	65,3 million EUR	66,0 million EUR
TOTAL (local currency)	324,6 million LTL	45,9 million LVL	1033,4 million EEK
Change % in local currency	-2%	-13%	-7%

Advertising Expenditure 2010

EUR per capita

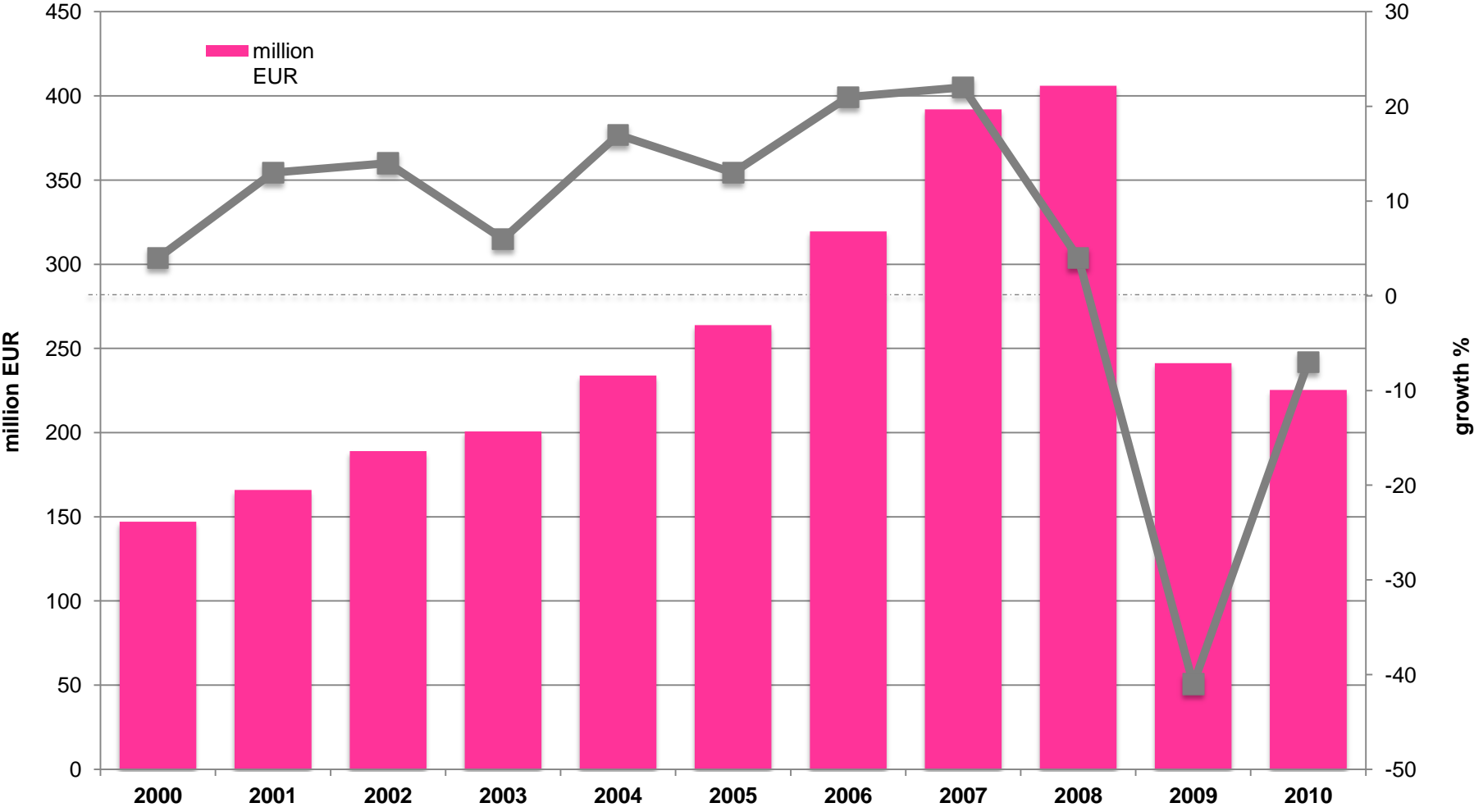


Ad market ratio to GDP



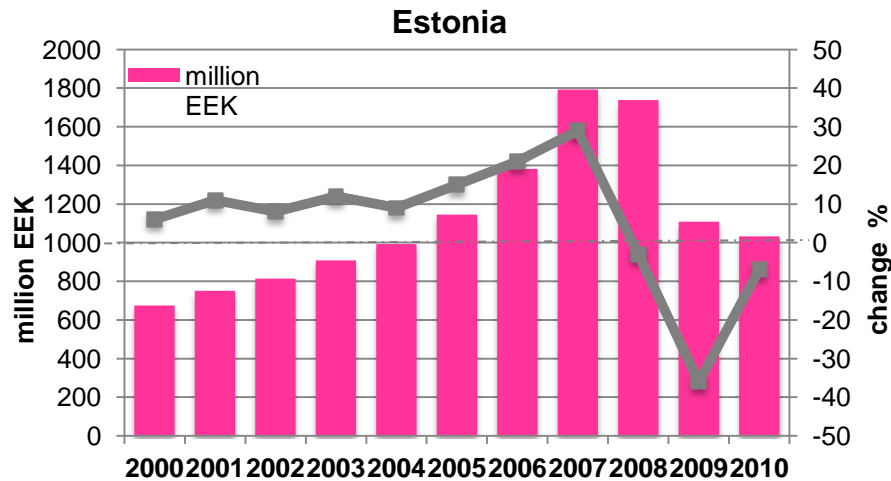
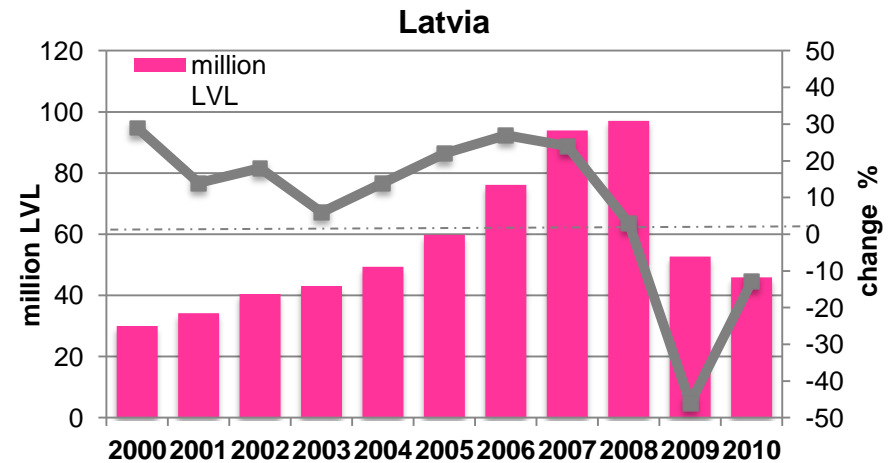
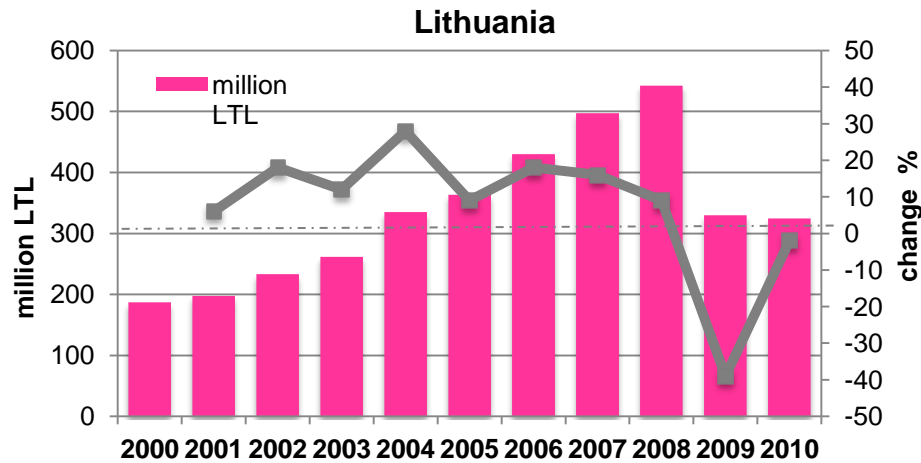
Advertising Expenditure 2000-2010

Baltic Trend



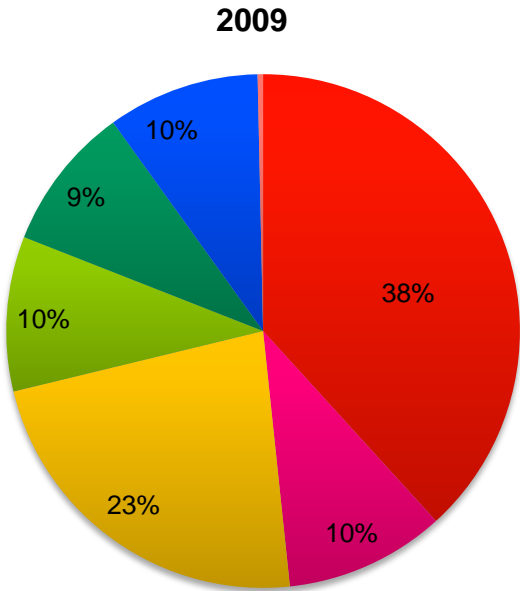
Advertising Expenditure 2010

Trends per country

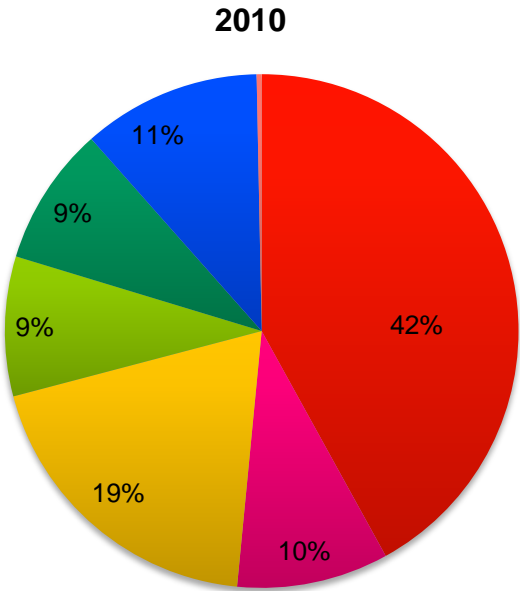


Distribution of Advertising Expenditure 2010

Baltic shares



Share of Cinema was 0,3% both years



change of media types 2010 vs 2009

TV	2%
Radio	-12%
Newspapers	-21%
Magazines	-16%
Outdoor	-10%
Internet	9%
Cinema	-14%

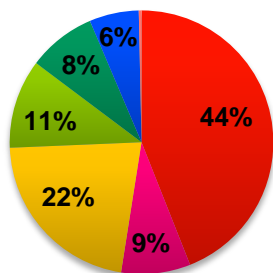


Distribution of Advertising Expenditure 2010

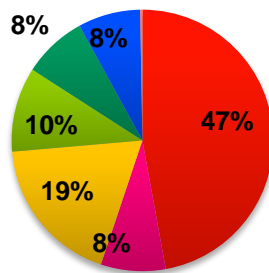
Shares per country

change of media types 2010 vs 2009

Lithuania 2009

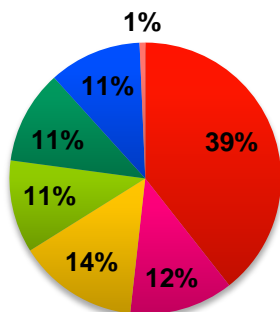


Lithuania 2010

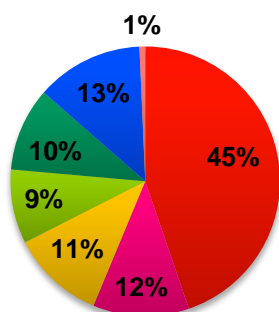


TV	6%
Radio	-7%
Newspapers	-17%
Magazines	-6%
Outdoor	-7%
Internet	25%
Cinema	-18%

Latvia 2009

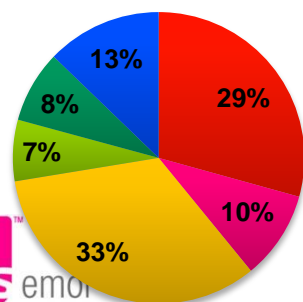


Latvia 2010

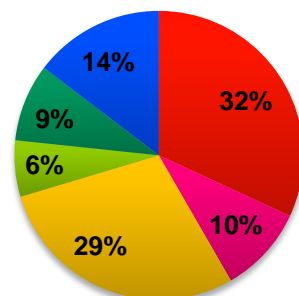


TV	-1%
Radio	-19%
Newspapers	-32%
Magazines	-30%
Outdoor	-22%
Internet	2%
Cinema	-11%

Estonia 2009



Estonia 2010



TV	1%
Radio	-7%
Newspapers	-20%
Magazines	-14%
Outdoor	1%
Internet	7%
Cinema	NA

TOP 10 Advertisers

LITHUANIA	LATVIA	ESTONIA
OMNITEL	TELE2	EMT
TELE2	PROCTER&GAMBLE	TELE2 EESTI
PROCTER&GAMBLE	BITE	PROCTER&GAMBLE
HENKEL	HENKEL	ELISA EESTI
MAXIMA LT	LMT	PLACET GROUP
DANONE GROUP	MAXIMA	TALLINK GRUPP
BITÈ	RIMI	RIMI BALTIC
RECKITT BENCKISER	L'OREAL	A-SELVER
PALINK	DANONE	UNILEVER
UNILEVER	UNILEVER	L'OREAL

TOP 10 Product Groups (2nd level)

LITHUANIA	LATVIA	ESTONIA
MOBILE COMMUNICATION	MOBILE COMMUNICATION	MOBILE COMMUNICATION
RETAIL	RETAIL	RETAIL
REMEDIES	REMEDIES	FINANCIAL INSTITUTIONS, SERVICES
HOUSEHOLD HYGIENE	FINANCIAL INSTITUTIONS, SERVICES	CONCERTS, FESTIVALS, SHOWS
CONCERTS, FESTIVALS, SHOWS	HOUSEHOLD HYGIENE	REMEDIES
COLD DRINKS	OTHER FOOD PRODUCTS	CARS
ALCOHOLIC BEVERAGES	ALCOHOLIC BEVERAGES	INTERNET
SWEETS, CONFECTIONERY	TELECOMMUNICATION	BUILDING MATERIALS
HAIR CARE	HAIR CARE	FURNITURE
MILK & CHEESE	COLD DRINKS	THEATRE, ART, CULTURE

Media Intelligence in the Baltics

What we offer?

- Advertising monitoring
 - media types covered - television, newspapers and magazines, radio, outdoor, internet and cinema (only in Lithuania)
- Clipping service
 - television and print media,
 - radio and internet (only in Latvia and Lithuania)
 - outdoor (only in Lithuania)
- News monitoring
 - Lithuania - continuous news monitoring in television, print media, radio and internet
 - Estonia, Latvia – news monitoring is conducted on ad hoc basis

Contact us!

ESTONIA

TNS Emor

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